

Research Top 10

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Dentsu Research, Chuohchosa-sha (Central Research Service), the Japan Marketing Research Assn. or Video-Audience Research—are not nearly large enough to make a worldwide top 10 listing (nor is the largest French company, SOFRES).

One enigma: The huge Nomura Research Institute in Tokyo, which has revenues in the range of \$50 million. Nomura does economic forecasting and social research, much of which is based on secondary source data. But it also does a considerable amount of custom

survey research. What per cent that is of the total Nomura volume is unknown, but there is no reason to believe it is large enough to get NRI on the Top 10 list.

1. A.C. Nielsen Co.—U.S. Of total revenues for the 12 months ending Nov. 30, 1982, 66.2%—or \$433.1 million—came from marketing/advertising research activities. Nielsen set up its first foreign subsidiary in Great Britain in 1939; today it has research operations in 25 countries. Basically these services are store-audit programs to develop market-size measurements, share of market for brands and tv audience measurement systems—either on a national or local-market basis. Nielsen is a public company.

2. IMS International—U.S. Of total revenues for 1982, about 74%—or \$124.8 million—came from marketing research activities in 34 countries. Basically this activity consists of market-size and brand-share measures in fields of interest to the pharmaceutical/medical and healthcare industry. IMS is a public company.

3. Selling Areas-Marketing

Inc.—U.S. SAMI's basic activity, available in the U.S. only, is to amalgamate warehouse withdrawal data to produce continuous movement figures on thousands of individual package goods items sold through food stores, separately for each of 48 marketing areas. Revenues for 1982 were estimated at \$85 million. SAMI is a wholly owned subsidiary of Time Inc.

4. Arbitron Ratings Co.—U.S. Arbitron's basic business is local-market measurements of radio and tv audiences, mostly via mail diaries and meter-equipped tv sets. They only operate in the U.S. Revenues for 1982 were estimated at \$80.3 million. Arbitron is a wholly owned subsidiary of Control Data Corp.

5. AGB Research PLC—U.K.

For the fiscal year ending April 30, 1983, this London-based conglomerate is expected to have total revenues of about \$93.4 million, of which about 79%—or \$73.6 million—will be attributable to research activities in 20 countries. These figures will reflect, for the first time, the approximately \$22 million gained through the acquisition of

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research people

Phillips new M/A/R/C chairman

DALLAS—C.B. (Bud) Phillips has been elected chairman-chief executive officer of M/A/R/C, the ninth-largest U.S. marketing research company.

Succeeding him as M/A/R/C president is E.L. (Jack) Taylor, who moves up from exec vp. Although Mr. Taylor gives up the chief executive officer title, he continues as chief operating officer.

Fred E. Hart, Peter B. Bogda and Sharon M. Munger, formerly se-

nior vps at M/A/R/C, have been promoted to exec vps. Additionally, Mr. Phillips has been named chairman-ceo of Allcom Inc., the parent company of M/A/R/C.

Other people moving:

Barbara Adage to R.H. Bruskin Associates, New Brunswick, N.J., as vp-client service, from Trendex Inc. Westport, Conn., where she was vp-sales. Also joining Bruskin in the area of client service and new-business development is **Jeffrey Harris**, formerly president of his own marketing company, and **Michael Brooks**, a senior project director, who comes from Market Science Associates, New York.

Alan D. Levin to research associate, Judith Langer Associates, New York, from a consulting practice.

Martin G. Letscher to head of consumer package goods research, Decision Research Corp., the market research division of Temple, Barker & Sloane, Lexington, Mass., from market research manager in charge of strategic marketing intelligence at S.C. Johnson & Son, Racine, Wis.

Timm R. Sweeney to director, client services, Management Assistance & Service, Sandy Hook, Conn., from vp-sales, Tele-Research, Westport, Conn.

James Bruni to vp and research associate, On-Site Testing, New York, from senior research analyst, Dresner, Morris & Tortorello Research.

Barry Wilensky to vp, JRB Marketing & Opinion Research, Great Neck, N.Y., from head of marketing research, foodservice division, General Foods, White Plains, N.Y.

Channing Stowell to senior vp-general manager of the Chicago office of Market Science Associates. Previously he was self-employed. Also to MSA as an account group manager, **Stephen C. Cosmas** from associate professor of marketing in the graduate school of business, DePaul Uni-

versity, Chicago.

Denise Georgemiller to senior project director in the custom marketing research group, Kapuler & Associates, Arlington Heights, Ill., from Creative Research Associates, Chicago.

Barbara Maldonado to field director, Consumer Response Corp., New York, from the field department of Market Facts.

Sharon R. Pope to vp-research, Tele-Research Item Movement, Los Angeles, from associate manager, statistical applications, market research department, General Foods, White Plains, N.Y.

Promotions

Cathy Branch to senior vp, On-Site Testing, New York.

John Glenn to senior project director and **John Traynow** to project director, Chicago office of Market Science Associates.

James Samples to senior vp, Management Horizons, Columbus, O.

Floyd M. Poling and **William H. Van Pelt Jr.** to client service group heads, Gallup & Robinson, Princeton, N.J.

Ursula Nardo to vp-director of field operations, Decisions Center, New York.

Jeffrey Marr to account group manager, special services division, and **Rebecca Cleveland** to senior project director, eastern account services division, Walker Research, Indianapolis.

George S. Fabian, formerly senior vp-director of research, SSC&B, New York, to exec vp.

The Automotive Market Research Council (AMRC) has elected new officers for 1983-84: President, **Joseph C. McCourt**, marketing research director, home and automotive products division, Union Carbide, Danbury, Conn.; vp, **Hugh W. Sloan Jr.**, president and general manager, Budd Canada Inc., Kitchener, Ont.; secretary, **Karl G. Motter Jr.**, manager of information systems, AP Parts Co., Toledo, #

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Research Top 10

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the U.S. research company, NFO Research. They would not yet reflect the recent acquisition (in part) of the Survey Research Group in Asia, which will take AGB's activities into six more countries. Basic AGB activities are consumer panels, tv audience measurement systems (mostly via meter-equipped tv sets), omnibus surveys and media research. It is a public company.

6. Burke Marketing Services—U.S. This company consists of (1) the Test Marketing Group—tv campaign testing and controlled marketing labs; (2) BASES—market modeling; (3) Professional Services—educational seminars; (4) Telecom Research—physiological measures of advertising stimuli; (5) Burke Marketing Research—pre- and post-tv copy testing and custom survey research, and (6) Burke Canada, which accounts for about \$1.4 million of the company's revenues. In addition there is a Burke International, a joint venture with Infratest, a West German company also on the Top 10 list, in which Burke owns a 5% interest. Burke is a privately held corporation.

7. Research International—U.K. This organization, which specializes in custom, ad hoc survey research, operates in 29 countries, and there are over 800 fulltime employees. Headquarters are in London. In some countries, RI conducts omnibus surveys and diary mail panels. It is a wholly owned subsidiary of Unilever Ltd., but less than 40% of its work comes from Unilever subsidiaries around the world. RI's total revenues in 1982: \$48.2 million.

Amana, FTC settle on ad safety claims

WASHINGTON—Amana Refrigeration and its agency, Foote, Cone & Belding, Chicago, have signed Federal Trade Commission settlement agreements which establish stringent procedures governing their use of safety claims and survey information.

Under the agreements, which are still subject to public comment, the company and the agency may not use test or survey evidence to advertise microwave ovens or other products unless results are reported accurately.

The agreements require them to retain all materials relied on, as well as adverse information, for the year period. FCB is permitted to rely on data supplied by qualified outsiders, including clients, so long as the information is in writing and is endorsed by a person who has appropriate training and experience.

Signing of the agreement represented a change of heart by Amana, which vowed stiff resistance when FTC issued its complaint last October (AA, Oct. 11). At that time the company's spokesman contended that no one was hurt by the ads and that FTC would seem to have more important things to do.

The agreement with FCB announced last week was the first word that FTC was also proceeding against the ad agency which had handled the disputed ads.

8. Infratest Forschung GmbH & Co. KG—West Germany This Munich-based company and its four subsidiaries had revenues of \$32.2 million in 1982. Infratest operates in five European countries, and there are about 465 employees, about 225 of whom are professionals. Infratest specializes in ad hoc consumer surveys, advertising and media research, omnibus surveys and political/public opinion polling. It is privately held and was founded in 1947.

(Infratest revenues do not include the partial acquisition of Research Services Ltd., a survey company in the U.K., a transaction that took place in early 1983. Also, Infratest and GFK [see below] jointly owned a consumer panel operation and Infratest sold its share to GFK in early 1983. That transaction is not reflected in either the Infratest

or GFK numbers. Also, Infratest owns 5% of Burke Marketing Services.)

9. Market Facts Inc.—U.S. This public company had revenues of \$25.4 million in 1982, not including those of a Canadian subsidiary, which is 50% owned by the parent. If included, that would add about \$2.4 million to its revenues. Market Facts' main U.S. activities are the Consumer Mail Panel, Marketest store-audit services, shopping mall facilities, WATS telephone interviewing and ad hoc survey research.

10. GFK Nürnberg Gesellschaft F Konsum und Absatzforschung & V.—West Germany This organization, which operates in six European countries, had revenues of \$23.9 million in 1982. Headquarters are in Nuremberg, and there are about 565 fulltime employees. GFK specializes in a broad range of research activities: Ad hoc survey research; advertising research; syndicated surveys;

package and product testing; industrial, financial, medical and agricultural marketing research. Founded in 1934, it is technically a trade association, and its shares cannot be sold to outsiders.

■ During 1982, these 10 organizations had, in total, marketing/advertising/public opinion research revenues of about \$978.6 million, and the Nielsen alone accounted for 44% of that.

I should like to thank those people who have—over a period of months—helped to document nearly 100 non-U.S. research organizations. Special thanks to Eileen Cole, chief executive officer of Research International; Wolfgang Ernst, ceo of Infratest Forschung GmbH & Co.; Morten M. Lenrow, director of international marketing research, PepsiCo; Jack Brown, chairman of Burke Marketing Services, and Ms. Gunilla Broadbent, vp-director of INRA at Starch INRA Hooper. #

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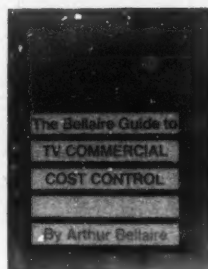
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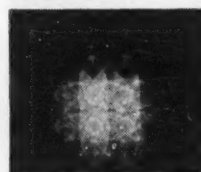
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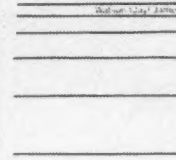
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Advertising pages for U.S., Canadian, and foreign consumer publications—July

	Current month		Year-to-date	
	1983	1982	1983	1982
— Art & antiques —				
American Artist	95.9	44.1	461.6	397.3
Antiques	93.8	103.4	859.7	1,017.9
Art & Antiques (6X)	75.1	84.0	264.0	250.3
Art in America (11X)	—	—	664.6	668.4
Portfolio (6X)	36.7	40.0	228.3	229.8
Southwest Art	55.0	79.0	611.6	763.7
Total Group	355.5	350.5	3,129.8	3,327.4
% change	+1.7%		-5.9%	

— Auto/cycle/rec. vehicles —				
AutoWeek	124.0	136.4	922.1	986.1
Car & Driver	84.6	75.0	640.8	567.6
Car Collector & Car Classics	20.5	24.8	147.0	153.1
Car Craft	61.8	80.1	539.5	550.2
Cycle	49.5	66.6	502.1	636.6
Cycle Guide	34.7	42.8	353.6	433.6
Cycle World	48.0	40.6	441.4	509.8
Dune Buggies & Hot VWs	73.4	61.1	457.0	370.9
Family Motor Coaching	147.3	123.8	825.4	694.3
4 Wheel & Offroad	61.5	52.0	450.9	349.9
Four Wheeler	47.5	30.5	276.2	193.7
Hot Rod	72.2	48.9	423.3	432.4
Motorcyclist	33.0	52.6	316.9	444.9
Motor Trend	70.1	52.4	454.9	405.3
Moto Home	89.3	73.6	520.8	438.4
Pickup, Van & 4 WD	42.0	32.3	236.5	192.0
Road & Track	92.6	87.3	691.9	652.2
3 Wheeling	28.7	23.4	181.5	143.8
Trailer Life	119.0	122.3	763.0	761.4
Total Group	1,299.7	1,228.5	9,144.8	8,916.2
% change	+5.9%		+2.5%	

— Boating & yachting —				
Boating	90.8	74.8	840.5	799.7
Chesapeake Bay	24.5	24.6	193.0	181.5
Cruising World	138.8	132.6	968.3	892.8
Lakeland Boating	37.1	40.0	346.2	354.9
Motor Boating & Sailing	108.5	98.9	1,008.6	970.1
Rudder	11.9	18.0	149.3	164.2
Sail	97.0	106.0	817.2	1,058.6
Sea & Pacific Skipper	58.5	70.1	500.6	526.1
Trailer Boats	18.5	16.2	184.6	181.2
Western Boatman	18.9	—	75.0	—
Yachting	129.7	146.6	1,068.8	1,248.3
Total Group	727.2	727.8	8,152.1	8,377.4
% change	-0.1%		-3.5%	

— Canadian —				
L'Actualite	33.7	28.7	332.2	370.8
Chateleane	—	—	—	—
English Edition A.	94.2	64.4	584.5	582.4
French Edition	53.9	41.3	525.4	467.0
Financial Post Magazine A.	9.3	29.0	216.0	256.9
Flare A.	—	—	300.4	286.5
Homemaker's Magazine	73.8	76.2	505.4	496.3
Madam Au Foyer	59.0	62.5	385.8	389.0
Maclean's (52X) A.	62.5	48.3	604.6	700.5
Quest Magazine (8X) A.	56.9	54.5	210.2	245.9
Reader's Digest:	—	—	—	—
Canadian-English A.	48.0	48.3	516.2	549.1
Canadian-French A.	39.0	39.0	460.8	547.6
Toronto Life	54.0	72.0	601.0	688.0
Vancouver	56.6	70.7	481.8	541.5
Total Group	610.9	634.9	5,734.3	6,121.5
% change	-3.7%		-8.3%	

— Civic/fraternal —				
American Legion	18.5	20.6	198.4	211.7
Eks Magazine (10X)	—	—	157.5	139.0
Kwanis Magazine	—	—	88.2	77.8
Lion (10X)	—	—	29.4	38.2
Moose Magazine	19.0	21.0	145.0	158.0
Rotarian	6.8	8.6	79.4	94.8
V.F.W. (10X)	—	—	196.8	163.2
Total Group	44.3	50.2	894.7	880.7
% change	-11.7%		+1.5%	

— Comics —				
Archie Comic Group (6X)	—	—	30.0	30.0
DC Comics	9.0	6.5	56.5	48.0
Marvel Comics Group	10.0	9.5	68.0	69.5
Total Group	19.0	16.0	154.5	147.5
% change	+18.7%		+4.7%	

— General —				
American West (6X)	—	—	104.6	102.3
The Atlantic A.	35.2	23.9	268.1	184.5
Audubon Magazine (6X)	30.0	25.3	143.4	119.9
Bon Appetit A.	53.6	57.3	505.2	527.6
Changing Times	37.8	27.9	282.3	252.7
Cuisine Magazine	32.6	15.7	241.8	262.4
Ebony	74.8	67.4	599.6	547.3
Fifty Plus	19.8	18.3	178.3	192.8
Food & Wine	24.3	20.1	233.7	167.3
Games	23.0	20.2	191.4	97.3
Geo	22.2	13.8	181.9	112.0
Gourmet	47.2	38.4	466.9	434.2
Harper's Magazine	16.6	13.2	113.4	125.2
Home Entertainment Quarterly	34.0	—	108.0	—
Let's Live	55.7	67.0	427.9	518.4
Life	70.0	38.3	400.2	341.1
Modern Maturity (6X)	—	—	117.7	96.3
Money	81.5	67.9	755.0	711.4
Moneysworth (4X)	—	15.7	51.8	108.0
Mother Earth News (6X)	42.9	43.2	209.6	198.1
Museum (6X)	20.0	29.0	65.0	186.0

National Geographic	15.8	15.4	168.0	153.0
Natural History	29.2	27.3	250.1	209.5
Prevention	70.9	71.9	531.3	482.4
Psychology Today	26.9	27.2	184.9	239.2
Reader's Digest A.	70.2	54.3	560.1	599.7
Saturday Evening Post (9X)	42.2	52.3	234.3	243.0
Signature	43.8	47.1	377.4	356.0
Smithsonian	52.4	47.0	476.2	508.5
Success	33.1	17.4	236.3	189.1
Town & Country	74.3	61.2	839.6	811.9
Travel/Holiday	25.1	29.0	296.1	340.3
Travel & Leisure	69.4	49.8	620.6	614.1
Video	60.5	55.2	426.8	372.9
Video Review	61.7	52.7	440.1	418.0
Writers Digest	31.9	17.2	175.9	155.4
Yankee	57.5	53.0	526.0	503.9
Total Group	1,486.1	1,280.6	11,989.5	11,462.7
% change	+16.0%		+4.5%	

— Home —				
Architectural Digest A.	99.5	74.9	850.0	845.7
Better Homes and Gardens	87.1	82.0	723.8	850.0
Colonial Homes (6X)	45.5	46.9	233.8	235.8
Country Journal	30.4	31.2	298.5	284.6
Country Living	43.5	45.5	327.1	218.8
Dallas/Ft. Worth	—	—	—	—
Home & Garden	65.4	48.8	457.8	374.8
Early American Life (6X)	28.4	21.4	102.0	111.5
Family Food Garden (6X)	—	—	230.5	175.5
Family Handyman (10X) A.	71.8	63.4	438.4	420.4
Flower & Garden (6X)	—	—	131.5	156.7
Home	28.9	23.7	241.2	180.9
The Homeowner (6X)	—	—	124.2	114.6
Horticulture	14.0	17.0	211.8	209.0
House Beautiful	74.3	50.1	560.4	484.2
House & Garden	39.7	60.2	421.7	598.8
Houston Home/Garden	97.0	108.2	680.7	763.5
Metropolitan Home	40.6	51.1	385.0	473.0
New Shelter (9X)	46.3	41.9	275.4	234.7
1001 Home Ideas	21.2	—	208.0	165.8
Organic Gardening	51.3	51.9	526.8	491.2
Phoenix Home/Garden	36.1	47.3	309.6	341.6
San Diego Home/Garden	65.2	44.6	464.2	356.2
Southern Accents (4X)	—	—	151.1	162.3
Southern Living	112.5	102.7	889.6	884.2
Sunset Magazine A.	118.2	101.3	965.1	943.9
Texas Homes	85.8	80.1	496.6	539.0
Workbench (6X)	51.9	45.3	245.3	236.4
Total Group	1,354.6	1,249.5	10,950.1	10,853.1
% change	+9.1%		+0.8%	

— In-flight & other passenger —				
Alaskafest	60.5	40.1	307.8	273.0
American Way	85.8	72.1	620.4	483.6
East/West Network:	—	—	—	—
Amtrak Express	34.8	28.8	284.0	265.3
Continental	53.5	47.5	426.5	377.8
Eastern Review	74.8	58.2	689.4	537.9
Ozark	39.8	36.5	312.1	291.5
PSA Magazine	83.2	66.3	583.6	578.5
Pan Am Clipper	38.2	44.8	284.8	269.9
Republic Scene	49.7	48.8	370.5	48.8
United	74.0	58.8	631.3	508.9
USAir	57.2	40.8	411.8	293.1
Western's World	51.0	36.8	405.8	36.8
Halsey Publications:	—	—	—	—
Air Call	45.5	—	259.8	—
Delta Sky	60.5	48.6	438.2	342.5
Skyline	19.3	18.5	122.6	52.0
Hawaii	21.9	17.6	115.9	149.6
Pace (6X)	35.3	33.9	167.4	120.7
Spirit of Aloha	21.8	17.8	111.7	142.5
Southwest Airlines	88.5	91.2	696.9	649.2
Webb Publications:	—	—	—	—
Frontier	28.3	33.5	245.9	275.4
Northwest Orient	28.8	32.8	237.9	218.9
TWA Ambassador	44.4	44.5	343.9	322.3
Total Group	1,086.8	917.9	8,078.2	6,238.0
% change	+18.4%		+29.4%	

— Men's —				
Esquire	50.0	50.0	622.0	377.5
Firehouse Magazine	36.2	36.5	300.6	288.7
Gentlemen's Quarterly A.	52.0	56.5	634.1	616.6
Penthouse A.	62.8	52.7	406.8	417.1
Playboy A.	87.9	98.8	585.8	749.4
Total Group	288.9	294.5	2,549.3	2,449.3
% change	-1.5%		+4.0%	

— Metropolitan —				
Aloha (6X)	29.0	23.0	129.0	140.8
Atlanta	39.4	49.1	351.1	438.0
Baltimore	53.7	46.5	393.2	395.1
Boston	129.8	126.7	864.8	822.2
California	55.1	49.1	444.7	465.4
Carolina Lifestyle	30.8	40.2	160.6	158.6
Charlotte	45.0	21.0	200.6	102.6
Chicago	84.6	98.6	903.0	907.6
Chicago's North Shore	83.8	69.5	546.4	426.6
Cincinnati	43.3	45.2	358.4	372.9
Cleveland	72.6	68.0	479.7	408.1
Coast (52X)	441.5	337.0	1,794.6	1,781.5
Columbus Monthly	87.7	77.2	444.5	510.1
Commonwealth	51.0	51.6	191.6	472.8
Connecticut	58.3	54.5	496.6	497.7
Country Magazine	33.5	23.7	194.2	166.9
County Life	39.3	39.0	304.4	39.0
D/Magazine, Dallas/Ft. Worth	111.5	118.7	746.1	756.0
Denver	29.7	35.7	226.2	255.3
Exclusively Yours, Wisconsin	54.0	55.1	446.4	467.8
Grand Rapids	58.2	50.7	325.5	292.8
Gulfshore Life (10X)	—	—	373.0	447.5

Honolulu	54.6	56.2	432.0	445.3
Houston City	77.6	72.0	444.8	444.8
Indianapolis	27.7	54.0	343.6	395.2
Long Island Life	25.5	23.1	196.0	141.0
Los Angeles	161.0	165.0	1,207.5	1,286.8
Louisiana Life (6X)	72.4	59.0	273.7	222.6

ad lineage

(Continued from Page 59)

	Current month		Year-to-date	
	1983	1982	1983	1982
Skin Diver	80.7	75.4	536.8	471.7
Southern Outdoors (8X)	35.7	37.9	246.4	246.7
Sport	38.1	32.2	271.4	264.7
Sports Afield	54.6	59.7	597.3	526.7
Spray's Water Ski (10X)	39.5	48.2	257.1	288.6
Tennis	96.1	79.7	554.1	461.1
Western Outdoors (10X)	—	—	191.7	210.2
World Tennis	56.4	53.6	359.2	288.2
Total Group	1,353.0	1,342.8	11,128.8	10,539.0
% change	+0.7%		+5.5%	

Photography

American Photographer	42.4	40.3	344.4	313.1
Petersen's Photography	35.4	33.5	230.8	296.2
Popular Photography	107.3	119.2	799.1	889.8
Total Group	185.1	193.0	1,374.3	1,499.1
% change	-4.0%		-8.3%	

Religious

A.D. Magazine (10X)	—	—	67.7	78.6
BBJ Jewish Monthly (10X)	—	—	134.2	147.2
Christian Herald	39.8	35.3	252.4	257.5
Christian Life	27.1	22.5	186.3	186.7
Christianity Today	23.0	27.3	425.3	423.1
Inside (4X)	—	—	134.8	120.4
Moody Monthly	37.7	36.0	346.3	340.9
Total Group	127.6	121.1	1,547.0	1,554.4
% change	+5.3%		-0.4%	

Science/electronic/mechanic

Compute	133.0	91.8	937.8	648.7
Computers & Electronics	58.4	50.7	430.0	400.0
Creative Computing	170.4	121.2	820.0	1,267.8
Discover	29.0	19.7	298.6	224.9
Electronic Games	41.5	15.7	318.6	78.3
High Technology D.	21.0	37.3	192.3	159.1
Mechanix Illustrated	45.3	46.7	470.8	457.3
Omni	52.8	48.7	410.8	373.8
Personal Computing	212.4	160.6	1,359.7	940.0
Popular Mechanics	74.9	72.0	682.3	708.1
Popular Science	63.7	58.5	583.7	575.3
Science Digest	37.1	28.8	230.9	190.1
Science 83 (10X)	43.9	47.3	230.9	204.1
Scientific American	34.8	52.2	339.0	464.6
Spectrum	69.0	45.0	545.2	473.3
Technology Illustrated D.	18.2	56.8	142.4	171.5
Total Group	1,105.4	953.0	7,993.0	7,336.9
% change	+15.9%		+8.9%	

Women/fashion/service

Bride's Magazine (6X) A.	378.0	365.1	1,389.2	1,253.1
Cosmopolitan A.	166.2	140.5	1,222.4	1,285.3
Essence	82.7	76.9	556.4	541.8
Family Circle A.	121.9	147.3	979.4	924.3
Glamour	99.5	93.1	1,028.8	1,000.9
Good Housekeeping A.	141.3	124.7	1,099.4	1,082.7
Handmade (4X)	—	—	56.7	41.4
Harper's Bazaar	55.5	53.5	698.7	665.0
Health	27.2	27.5	224.9	194.9
Ladies' Home Journal	101.4	70.4	633.5	499.7
Lady's Circle	6.5	10.5	58.7	66.4
Mademoiselle	81.9	73.2	609.9	766.9
McCall's	82.6	65.6	581.0	540.9
Modern Bride (6X)	378.4	350.9	1,160.2	1,163.7
Ms. D.	44.5	136.7	269.7	378.8
New Woman	41.4	34.5	322.0	253.3
Parents Magazine A.	71.7	64.4	507.9	486.1
Playgirl	38.0	44.0	274.5	288.1
Redbook	84.1	62.2	564.0	585.3
Self	56.4	54.4	482.1	470.6
Seventeen	65.6	54.2	643.3	682.0
Soap Opera Digest	42.8	28.0	210.7	177.3
'Teen Magazine	38.4	33.8	321.8	303.6
True Story A.	55.0	49.2	395.8	380.0
Vogue	123.2	121.9	1,351.1	1,318.1
W Magazine	53.2	47.2	556.3	546.8
Weight Watchers	25.1	28.2	199.5	196.7
Woman's Day A.	87.9	102.5	811.1	775.3
The Workbasket (10X)	—	—	226.8	213.4
Working Mother	60.6	60.0	438.1	425.5
Working Woman	58.7	50.4	581.3	519.4
Total Group	2,889.4	2,670.8	18,786.2	18,017.3
% change	+3.8%		+4.1%	

Youth

Boys' Life	16.2	13.9	149.1	129.6
Campus Life	26.0	22.6	242.3	252.9
Total Group	44.2	36.5	391.4	382.5
% change	+21.0%		+2.3%	

June

Business

Atlanta Bus. Chronicle (52X) ...	30.4	27.1	198.6	150.4
Barron's (52X)	179.8	147.0	1,202.2	1,057.3
Black Enterprise	172.7	142.7	349.7	386.1
Boston Business Journal	62.6	36.6	377.5	193.4
Business Week (52X) A.	381.0	383.9	2,152.7	2,277.4
California Business	75.3	65.0	408.9	442.1
Capital District Bus. Review ..	35.8	26.0	213.6	174.0
Corporate Report/Kansas City ..	62.4	64.9	289.9	321.9
Corporate Report/Minnesota ..	74.5	85.9	474.4	459.5
Crain's Chicago Bus. (52X)	113.2	105.3	710.7	605.5
Crain's Cleveland Bus.	48.7	36.9	296.3	182.8
Dallas/Ft. Worth Bus. (52X)	32.5	34.6	198.2	247.3
Dun's Business Month	72.8	70.9	386.0	422.4
The Executive	97.8	81.0	417.8	482.6
Financial World (24X)	26.2	43.6	237.2	294.6

	Current month		Year-to-date	
	1983	1982	1983	1982
Florida Trend	80.7	48.8	436.9	433.0
Forbes (26X)	208.4	216.1	1,441.9	1,400.0
Fortune (26X) A.	242.4	201.3	1,431.3	1,303.9
Hawaii Business	55.1	40.8	282.2	254.7
Houston Bus. Journal (52X)	150.6	172.8	915.3	1,107.0
Inc. Magazine A.	121.9	71.6	619.7	494.0
Income Opportunities (10X)	44.6	39.4	251.1	244.5
Industry Week (26X) A.	129.8	122.1	574.6	747.9
Indianapolis Business Journal ..	74.1	49.2	510.7	384.7
Nation's Business A.	21.4	35.0	165.9	226.3
New England Bus. (20X) B.	96.3	76.8	444.8	381.5
New Orleans Citibusiness (26X) ..	90.2	74.8	690.8	402.4
Pacific Business News (52X)	90.7	99.7	575.2	530.5
Philadelphia Bus. Journal	60.5	29.8	354.1	120.0
Pittsburgh Bus. Times (52X)	29.1	24.5	218.9	291.1
St. Louis Business Journal	105.1	81.4	629.0	559.0
Texas Business	68.4	49.3	315.6	319.1
Venture	60.7	41.8	337.6	235.3
Total Group	3,195.7	2,828.6	18,109.3	17,142.2
% change	+12.8%		+5.8%	

Newspaper Sunday magazines*

Anzara Republic	56.5	95.5	410.9	608.4
Boston Globe	151.5	137.6	1,033.3	965.0
Chicago Tribune	69.1	88.6	499.8	556.8
Cincinnati Enquirer	61.4	77.0	428.3	467.9
Cleveland Plain Dealer	90.0	91.9	495.8	454.3
Columbus Dispatch	42.8	57.6	264.4	348.7
Dallas Times Herald	71.5	76.9	436.2	458.2
Denver Post	91.3	120.0	652.0	787.6
L.A. Times Home Magazine	95.0	122.7	491.2	588.3
Louisville Courier-Journal	64.5	74.9	511.3	548.5
Miami Herald	51.4	53.9	329.9	391.9
New York News F.	69.5	—	364.1	—
New York Times Magazine	219.0	243.7	1,882.0	1,964.2
Philadelphia Inquirer	48.1	63.9	321.3	352.5
Toledo Blade Magazine	41.2	42.2	283.7	285.5
Washington Post	97.7	100.2	638.1	675.9
Total Group	1,251.0	1,446.6	8,578.2	9,484.7
% change	-13.5%		-8.3%	

Weeklies/bi-weeklies

The Advocate (25X)	105.7	118.2	637.9	470.1
Army Times Military Group	—	—	—	—
Air Force Times (52X)	142.7	129.7	860.4	853.3
Army Times (52X)	143.5	126.5	837.0	840.1
Navy Times (52X)	180.5	151.0	965.9	1,003.0
The Times Magazine	21.8	23.8	97.0	97.8
The Blood-Horse (52X)	307.6	274.8	2,682.4	2,644.6
Capper's Weekly (26X)	18.1	16.1	163.8	147.7
Commonwealth (22X)	5.1	3.6	44.7	52.6
Golf World (43X)	87.0	82.0	513.6	446.8
Gnt (52X) A.	17.0	20.0	160.1	156.2
National Review	31.2	31.2	187.2	176.0
New Republic (48X)	32.1	39.5	190.9	176.5
New York Magazine (50X)	171.6	161.3	1,321.5	1,138.9
New Yorker (52X)	229.9	259.0	1,673.0	1,937.7
Newsweek (52X) A.	216.7	199.1	1,328.8	1,316.3
People (52X)	252.4	272.2	1,596.1	1,710.5
Rolling Stone (25X)	90.6	90.5	543.1	526.0
Sporting News (52X)	52.9	51.3	330.0	324.3
Sports Illustrated (52X) A.	239.6	207.7	1,357.1	1,326.1
Time (52X) A.	188.0	180.0	1,304.6	1,272.8
Travelhost (52X) C.	2,813.0	2,343.0	16,127.0	14,067.0
TV Guide (52X) A.	203.9	212.6	1,799.6	1,836.9
Us Magazine (26X)	38.4	53.1	264.0	287.4
U.S. News & World Report (52X) A.	137.9	133.1	887.4	847.5
Total Group	5,707.2	5,179.3	35,881.1	33,656.1
% change	+10.1%		+6.8%	

Foreign

Buenahoraz:				
Central America	2.0	3.5	11.0	21.0
Chile	2.0	2.0	7.0	12.2
Colombia	42.7	76.0	216.5	292.0
Dominican Republic	12.3	13.5	73.7	89.3
Ecuador	14.0	17.3	49.3	60.3
Mexico	24.7	43.5	254.3	359.3
Peru	34.7	37.0	109.7	188.0
Puerto Rico	23.5	20.0	82.8	107.5
U.S.	17.5	8.5	51.5	36.5
Venezuela	26.0	51.2	128.5	236.0
Coqueta:				
Central America	—	—	—	5.0
Colombia	3.0	6.5	8.0	30.0
Mexico	—	6.0	8.0	50.3
Peru	—	—	—	5.0
Puerto Rico	—	1.5	1.0	11.5
Venezuela	4.0	5.0	19.0	32.0
Geomundo:				
Central America	4.0	9.0	26.0	36.0
Chile	4.0	8.0	29.0	36.0
Colombia	14.0	17.7	59.0	73.7
Ecuador	4.0	5.0	24.0	28.0
Mexico	6.0	17.3	38.5	78.8
Peru	7.0	7.0	33.0	48.0
Puerto Rico	2.0	9.0	21.0	40.0
Venezuela	9.0	24.2	64.7	96.7
Hombre De Mundo:				
Central America	8.0	8.7	34.3	31.8
Chile	8.0	6.2	33.0	31.0
Colombia	16.5	21.0	56.5	80.0
Ecuador	8.0	5.2	33.0	27.8
Mexico	17.3	22.8	65.8	119.8
Peru	10.0	8.2	27.0	36.8
Puerto Rico	9.5	13.8	31.8	50.8
Venezuela	14.5	43.3	91.3	186.5
Ideas Para Su Hogar:				
Central America	—	—	2.0	6.0
Chile	—	—	—	4.0
Colombia	32.8	37.5	138.3	143.3
Ecuador	4.0	9.3	14.0	38.2
Mexico	6.3	10.3	90.8	142.8
Peru	10.5	24.5	25.5	81.5

Coen details spending surge

(Continued from Page 3)
was up 10% over the same period in 1982.

Newspaper advertising has "done surprisingly well," according to Mr. Coen. In the first quarter, classified advertising was up 15% and retail was up 12%. National advertising is up 6%. "The help wanted and real estate advertising hasn't really boiled up yet," Mr. Coen said, adding that he expects comebacks in both categories later in the year. Also, retail advertising has undergone a resurgence in the first quarter.

But newspapers have lost some cigaret and automobile advertising—two major categories for the medium. According to Mr. Coen's calculations, cigaret advertising in newspapers in the first quarter was down 9% and automobiles 3%. "Cigaret promotions are way down, compared with the first quarter of 1982," Mr. Coen said. Referring to automobiles, he noted rebate advertising has been shifted over to the dealers, replaced by more image advertising. The greatest gain in newspaper advertising can be found in preprint newspaper inserts, up a substantial 33% in the first quarter of 1983. Moderate increases have been made in news-

5%. Drug remedies spent 16% more in network, 3% more in spot tv and 13% in magazines, while toiletries increased network spending by 9%, spot tv by 12% and magazine spending stayed the same. Restaurant advertisers increased network and spot tv spending by 13% each and decreased their magazine allotment by 7%.

Home computers and videogame marketers have taken to advertising in a big way. The companies increased spot tv spending by 141%, network tv spending by 103% but they decreased magazine spending by 34%. Airlines shifted out of network (down 10%) into spot tv (up 23%) and magazines (up 29%). Records/tapes advertisers spent 262% more on network tv, 19% less in spot tv and 14% more in magazines.

Major appliances and household

furnishings, industries hard hit by the recession, cut back on network tv spending by 39% and 26%, respectively. Household furnishings marginally increased spending elsewhere—5% more in spot tv and 1% more in magazines. The major appliances also cut back in spot tv (decreased spending 11%) but increased magazine spending by 24% in the first quarter. Wine marketers cut back on network tv by 11%, on magazines by 13% and increased spot tv spending by 2%.

Cigaret companies increased their spending in magazines by 35%. Beer advertisers invested 46% more in network tv than in the first quarter of 1982; 5% more in spot tv, and 16% more in magazines. Pet food companies increased media spending across the board—34% more in spot tv, 23% more in network tv and 13% more

in magazines.

Two industries that cut back considerably on ad spending in the first quarter were liquor and petroleum. Liquor budgets were 20% lower in magazines in the first quarter. Oil companies spent 57% less in network tv, 51% less in magazines and 35% more in spot tv.

"Our December, 1982, projections for 1983 expenditures were

made at a time when the economy was at its lowest point and the exact timing of the recovery was in doubt," Mr. Coen said. "It is now apparent that the economy and advertising spending both have been on the uptrend for most of the first half of 1983. This will prove to be a year of economic expansion and one in which advertising also will show continued improvement." #

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The outlook for 1983

	Change over '82 (%)	Millions of dollars
Magazines	11.0	4,120
Nat'l newspapers	8.0	2,650
Network tv	11.0	6,895
Spot tv	8.5	4,730
Network radio	20.0	305
Spot radio	9.0	1,005
Direct mail	13.0	11,660
Other nat'l	8.0	10,355
Total nat'l	10.4	41,720
Total local	11.7	32,160
Grand total	11.0	73,880

Source: Robert Coen, McCann-Erickson

Network radio spending is expected to gain the most in listed categories with a 20% increase.

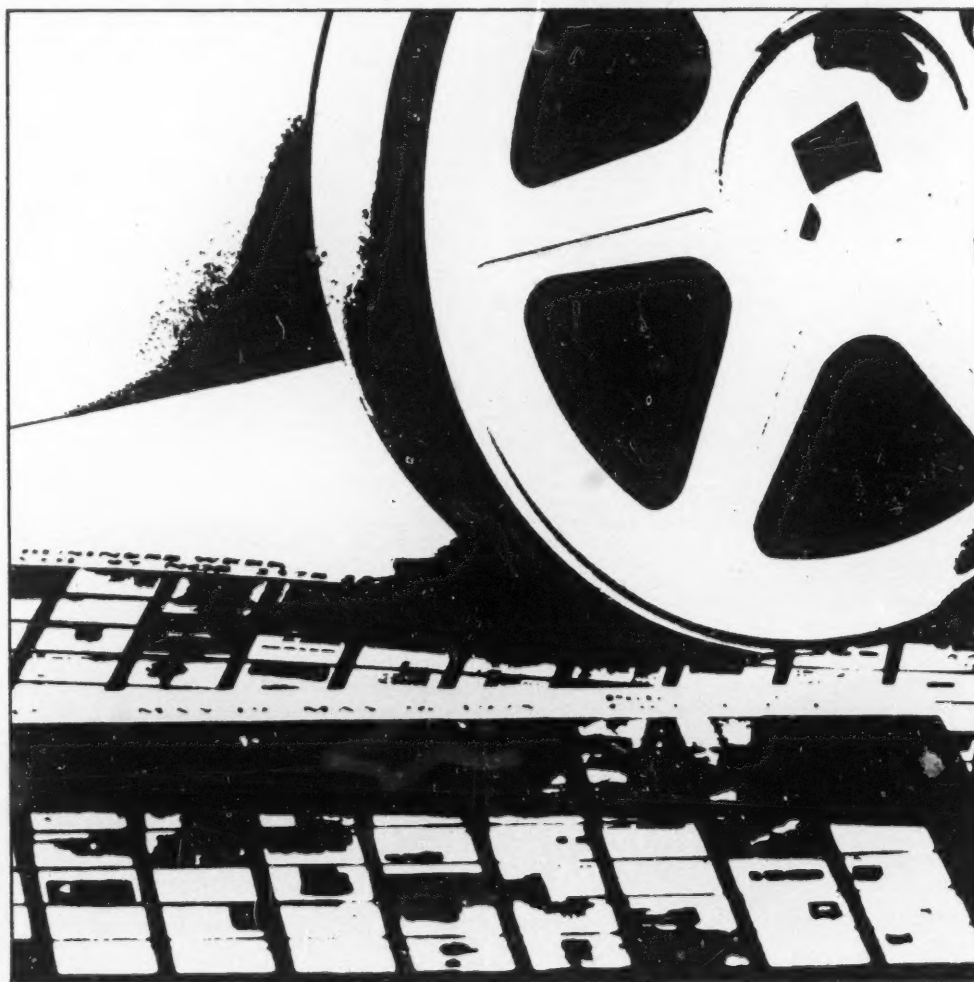
paper schedules by airlines (1%), foods (2%) and liquor (4%).

A medium that really has taken off is the third-class presorted commercial mail, he reported. "Mail advertising is strong and will continue to be strong," Mr. Coen said. In the first quarter of 1983, 4.8 billion pieces of mail were distributed, a 14% increase over the same quarter a year before. Total postage added up to \$444 million, another 14% jump.

Examining the various product categories, Mr. Coen pointed out a shift to more traditional image advertising from price and rebate campaigns. Also, advertisers are looking more seriously at alternative media than they ever have, he said. For instance, led by Procter & Gamble, cleaners/waxes advertisers are spending 52% more in spot tv, 12% more in network tv and 17% less in magazines.

On the other hand, food advertisers are spending 25% more in magazines, 6% more in spot tv and 3% more in network tv, as compared with the same quarter a year ago. For the first three months of 1983, automobile companies increased network tv spending by 33%, magazine spending by 24% and spot tv by 8%. Candy/soft drinks increased spot tv spending by 25%, magazine by 10% and decreased network tv spending by

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